

511 Regional Rideshare Program

Standard Operating Procedures



Commuter Services Department

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- Appendices that are marked “Pending” indicate a place mark for appendices that are in progress or planned but not yet finished.
- Some appendices have been excluded due to the proprietary and sensitive nature of the material they contain.

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Commuter Services Department Overview

The Commuter Services Department (CSD) fields questions from the public about 511 Rideshare services (carpooling, vanpooling, bicycling, employer outreach and commuter incentives), as well as public transit and airport related inquiries. The CSD is staffed by 3 FTE Commuter Services Representatives (CSRs) and 1 FTE Commuter Services Manager. The CSRs are expected to be knowledgeable about all 511 services and able to direct calls to appropriate resources like FasTrak and Clipper, if necessary. Temporary help can be utilized for special projects in the event additional resources are needed. CSRs are trained to answer questions about 511 Rideshare service offerings and to assist commuters with alternative modes of transportation for their commute to and from work in the San Francisco Bay Area. Because 511 Rideshare has the only live operators available within 511, outside of the transit agencies, the CSRs also answer airport and transit related inquiries.

(Appendix – CSD Job Description – Commuter Services Representative)

(Appendix – CSD Job Description – Commuter Services Representative II)

(Appendix – CSD Job Description – Lead Commuter Services Representative)

(Appendix – CSD Job Description – Commuter Services Manager)

World Class Customer Service

The CSD is committed to providing World Class Customer Service (WCCS) and has developed a **CSD Vision Statement** to guide this effort.

(Appendix – CSD Vision Statement)

Quality Assurance / Quality Control / Feedback

A series of quality assurance, quality control, and feedback (QA/QC/Feedback) processes are regularly utilized to ensure that all tasks are conducted consistently, accurately and efficiently. The tools used for QA/QC/Feedback purposes are listed in the **CSD Tools** document that is referenced in the **Daily, Weekly and Monthly Tasks** section below.

Core Responsibilities

The CSD is tasked with managing the following core responsibilities of the 511 Rideshare program:

- Contact Center coverage (formerly referred to as the Call Center)
- Managing, maintaining and updating the 511 RideMatch Service (RMS)
 - New Record Data Entry
 - Record Updates
 - Data Integrity
 - Reporting
 - User and administrator development and usability recommendations
 - Troubleshooting and debugging
- Matchlist request (MLR) form and survey data entry
- Matchlist generation and distribution

- Conducting placement calls to RMS users
- 511 Bicycling Web Site Maintenance
- Day 2 Parking Inventory Effort

Contact Center Coverage

A primary responsibility of the Commuter Services Department is to provide Contact Center coverage during business hours and to address all incoming phone, email, mail and fax inquiries.

Hours of Operation

The Contact Center is open Monday through Friday, from 8am - 6pm, during MTC business days. Automated phone prompts provide off-hour resources for callers who need off-hours assistance.

Phones

Incoming 511 Rideshare calls are forwarded to the Contact Center via the 511 system or by directly dialing 510-273-3600. The call flow process is illustrated in the attached **Incoming Call Routes** document. Calls to the Contact Center ring to a designated Hunt Group with extensions located at designated CSR workstations so CSRs can answer incoming calls. The number of extensions and workstations associated with the Contact Center Hunt Group can be increased (or decreased) in order to modify call capacity. All incoming and outgoing Contact Center calls received and placed using the CSD Hunt Group are coded in the Avaya phone system so call reports can be generated. Multi-lingual telephone services are provided by bilingual CSRs and/or the use of a translation services organization. Services for people with hearing or speech disabilities are provided through the use of the Dial 711 Telecommunication Relay Services (TRS).

(Appendix – Incoming Call Routes)

(Appendix – Contact Center Hunt Group Phone Settings, Configuration and Voicemail)

(Appendix – Avaya Phone System Account Codes)

(Appendix – CSD SOP - Translation Services)

Voicemail

When all engaged CSD Hunt Group extensions are busy (each line can handle up to 3 incoming calls) the incoming caller is given an option to hold until a CSR becomes available, choose to leave a voicemail or to hang up. During off-hours, an automated greeting provides online and automated resources and an option to leave a voicemail is provided. Whenever voicemails are left a visual indicator is displayed on each CSD Hunt Group enabled phone while an automated email is sent to the central CSD email. When received, voicemails are retrieved and each call is captured in the **CSD Voicemail Log** (see **CSD Logs and Workbooks** in the **Daily, Weekly and Monthly Tasks** section below).

Email

Contact Center emails are regularly reviewed and responded to using a centralized email processing system that allows each CSR to access emails from their respective workstations. All emails are filed in a series of folders in order to capture email-related data for analysis. Incoming and outgoing email figures are documented on a monthly basis in the **Contact Center Email Log** (see **CSD Logs and Workbooks** in the **Daily, Weekly and Monthly Tasks** section below).

Mail and Fax

Incoming mail and fax inquiries related to the Contact Center are received and responded to promptly.

Additional / Backup Phone Coverage

In the event additional or backup phone coverage is necessary all 511 Rideshare team members have been trained to answer the phones. Physical and web-based reference tools have been created to supplement the training process, as well as to provide additional resources for those who need them. The following CSD reference materials are maintained and updated on an ongoing basis in order to keep them accurate and up-to-date: **Contact Center Reference Binder**; **Contact Center Internet Shortcuts**; and **Brochures, Maps and Schedules**.

(Appendix – Contact Center Reference Binder Table of Contents)

(Appendix – Contact Center Internet Shortcuts)

(Appendix – Contact Center Brochures, Maps and Schedules Table of Contents)

Contact Center Closure Processes

During MTC-established holidays Contact Center closed phone greetings and email conditions are activated in order to provide off-hours assistance. Callers and e-mailers are given the option of following automated phone prompts for airport and transit related information; visiting the 511.org Web site; or leaving a voicemail or email for follow-up during business hours. Upon returning to work after a Contact Center closure, the Contact Center closed phone greetings and email conditions are deactivated and a series of reports are run so individuals who tried to contact us via phone, email or Web site submission forms are responded to in a timely manner. Please see the attached **Contact Center Closure Procedures** for more details.

(Appendix – Contact Center Closure Procedures)

Prank, Misdirected and Emergency Calls / Undeliverable, Spam, and Misdirected Emails

Prank, misdirected and emergency calls / undeliverable, spam, and misdirected emails are each handled accordingly as dictated by the scenario. For more details please see the attached **511 Rideshare Threat Call Form** and **Anomalous Calls and Emails Procedures** document.

(Appendix – 511 Rideshare Threat Call Form)

(Appendix – Anomalous Calls and Emails Procedures) – Pending

Emergency, Planned, and Unplanned Events

When an emergency, planned, or unplanned event creates a disruption to the transportation network (e.g., freeway closure, bridge closure, and impending or actual transit service disruption) the Contact Center can assist the public by providing alternative ridesharing and transportation solutions for their commutes. Contact Center hours of operation can be expanded if necessary.

Daily, Weekly, Monthly and Other Tasks

The CSD is responsible for completing daily, weekly, monthly and other tasks and projects in line with departmental responsibilities and 511 Rideshare project deliverables.

CSD Tools

The Commuter Services Department uses a series of **CSD Tools** to efficiently and effectively carry out daily, weekly, monthly and other tasks in line with departmental responsibilities and project deliverables. A list of the tools is documented in a **CSD Tools Outline**. The **CSD Responsibilities and Deadline Guidelines** document provides an overview of CSD departmental responsibilities and sets expectations for task completion.

(Appendix – CSD Tools Outline)

(Appendix – CSD Responsibilities and Deadline Guidelines)

(Appendix – CSD Checklist – Daily and Weekly)

(Appendix – CSD Checklist – Monthly)

(Appendix – CSD Daily Game Plan)

CSD Logs and Workbooks

A series of **CSD Logs and Workbooks** have been developed to manage, capture and document CSD departmental efforts. The **CSD Logs and Workbooks** listed below are included in the appendix. The use of these **CSD Tools**, combined with established CSD procedures and processes, helps the department consistently generate high quality results and meet best practices standards.

(Appendix – Placement Call MTD Workbook)

(Appendix – CSD Voicemail Log)

(Appendix – VPS Placement Calls Log)

(Appendix – Contact Center Email Log)

(Appendix – Event and Survey Log)

(Appendix – Bicycle Web Site Maintenance Log)

(Appendix – Day 2 Voicemail Log)

(Appendix – Day 2 Parking Inventory Effort – Municipality Snapshot)

(Appendix – Day 2 Parking Inventory Effort – On-Street Parking Log – Pending)

(Appendix – Day 2 Parking Inventory Effort – Off-Street Parking Log – Pending)

(Appendix – Day 2 Transit Log – Pending)

(Appendix – Day 2 Shuttle Log – Pending)

(Appendix – CSD Customer Satisfaction Survey)

(Appendix – CSD Daily Work Log)

(Appendix – CSR Daily Work Log)

Carpool to BART Permits

Carpool to BART Permit requests are processed on a daily basis. They are submitted to 511 Rideshare via a Web site request form; entered into a BART Permits database; printed; proofed; and mailed.

(Appendix – Carpool to BART Permit Request Form)

(Appendix – Carpool to BART Permit Request Report)

(Appendix – Carpool to BART Permit)

(Appendix – Carpool to BART Permits Issued Report)

Employer Survey Data Entry

The CSD is responsible for employer survey data entry. Hardcopy employer survey forms are entered into designated employer survey URLs so the Evaluation and Employer Services Departments can provide statistical data to employers.

(Appendix – Employer Survey Data Entry Form)

511 RideMatch Service Maintenance

The CSD is responsible for maintaining the 511 RideMatch Service (RMS). The RMS allows registrants to find ridesharing matches (carpool, vanpool, or bike buddy) with other commuters who are interested in ridesharing and have similar ridesharing criteria, commute patterns and schedules. The RMS also allows users to log their daily commute trips into a **Trip Diary** in order to earn free rewards and incentives, as well as finding regional incentives and/or county benefits they may be eligible to receive. The RMS also allows users to find one-time Special Event ridesharing so they can share a ride to the theater, a concert or a sporting event. 511 RMS maintenance breaks out into four general categories: **New Record Data Entry, Matchlist Generation and Distribution, Record Updates and Data Integrity Efforts.**

New Record Data Entry

The CSD is responsible for entering the majority of the administrator-entered new records into the RMS. The bulk of this data entry comes from **Matchlist Request (MLR) Forms** submitted to the CSD from employer and commuter events. Registrants may also call into the CSD and have their records entered into the RMS over the telephone, particularly if a user is interested in our ridesharing services but doesn't have an email address or access to the internet. An automated **511 Rideshare Activation Email** is sent out from the RMS upon submission of each new record. A process to address all undeliverable emails (UDEs) is conducted regularly and attempts to call the registrant are made to see if a valid email address can be obtained.

(Appendix – Matchlist Request Form – English)

(Appendix – Matchlist Request Form – Spanish)

(Appendix – 511 Rideshare Activation Email – SELF Created)

(Appendix – 511 Rideshare Activation Email – ADMIN Created)

Matchlist Generation and Distribution

The CSD is responsible for Matchlist generation, which requires using the RMS to create matchlists for interested registrants. Matchlists provide the user with a list of other registrants in the RMS that have similar Ridesharing criteria, commute patterns and schedules. Distribution of matchlists can be done via email, phone, mail and fax.

(Appendix – Matchlist)

Record Updates

The CSD is responsible for updating records in the RMS when necessary due to the request of a registrant, as well as entering appropriate activity codes and notes which reflect the actions taken.

Data Integrity Efforts

The CSD is responsible for maintaining the integrity of user and employer data in the RMS. Data integrity efforts are conducted on an ongoing basis using daily, weekly, monthly and ad hoc reports to cross-

reference efforts and to maintain the integrity of user and employer data by confirming that information is accurate and up-to-date.

CSD Reports

Following is a list of the daily, weekly and monthly CSD Reports that are used for data integrity efforts and/or capturing, analyzing and reporting data.

Avaya Phone Reports

(Appendix – RRP Account Code Calls – FY 09-10)
(Appendix – DID Response)
(Appendix – Account Code Log by Agent Group)
(Appendix – Account Code Log by Agent Group [Graphical])
(Appendix – Agent Group Tabular Summary [all calls])
(Appendix – Agent Group Tabular)
(Appendix – Incoming Duration Summary)
(Appendix – Agent Group Graphical Summary [all calls])

RMS Reports

(Appendix – Activity Codes - Daily – Pending)
(Appendix – Activity Codes - Weekly – Pending)
(Appendix – Activity Codes - Month to Date – Pending)
(Appendix – Status Summary – Pending)
(Appendix – Status Detail – Pending)
(Appendix – Additional Information for Review – Pending)
(Appendix – New Record Review – Pending)
(Appendix – Newly Added Employers – Locations [Data Entry Form Created])
(Appendix – New Employer Worksites for Review (Employer Module Created) – Pending)
(Appendix – Potential Duplicates for Review – Pending)
(Appendix – Lifecycle - NR Records (Day 5) – Pending)
(Appendix – Lifecycle - Inactivity (WITHOUT email) (Day 30) – Pending)
(Appendix – Lifecycle - Inactivity (WITHOUT email) (Day 60) – Pending)
(Appendix – Lifecycle - Inactivity (WITHOUT email) (Day 90) – Pending)
(Appendix – Lifecycle - Inactivity (WITH email) (Day 30) – Pending)
(Appendix – Lifecycle - Inactivity (WITH email) (Day 60) – Pending)
(Appendix – Lifecycle - Inactivity (WITH email) (Day 90) – Pending)

Other Reports

(Appendix – Chinese Find-A-Match Request)
(Appendix – Spanish Find-A-Match Request)

Placement Calls

The CSD is responsible for making 12,000 placement calls a year.

Purpose

To increase the number of Estimated Clients Placed (see the attached **Estimated Clients Placed Calculation**) by contacting commuters to advise them of rideshare matches; answer ridesharing inquiries; and maintain the integrity of the records in the RMS database for the purpose of facilitating efficient and accurate sharing of information between potential carpool, vanpool and bike buddy matches.

(Appendix – Estimated Clients Placed Calculation)

Sources / Reasons

- Existing RMS users (random calls, new matches identified, inactivity, data integrity)
- Carpool, vanpool and bike buddy related efforts
- Matchlist Request (MLR) Forms (incomplete or illegible forms)
- Data integrity efforts (e.g., incorrect data, undeliverable email addresses, bad phone numbers, records without email addresses)
- Lifecycle follow-up efforts (e.g., record activation efforts and periods of inactivity follow-up)
- Client, 511 Rideshare staff or other requests to contact a commuter
- Client Survey requests for contact or comments follow-up
- Others as necessary

Criteria

Each of the following four criteria must be met in order to take credit for a Placement Call:

- **The individual has a record in the RMS.**
- **During the call at least one of the following items must be addressed:**
 - Assistance is offered to find carpool, vanpool or bike buddy matches.
 - The commuter is told something about their matchlist (i.e., provided match-related information, advised of new potential ridesharing partner(s), informed of ways to expand or refine their number of matches via match preference changes).
 - The commuter is encouraged to view their matchlist online.
 - The commuter views their matchlist online.
 - The commuter is emailed, mailed or faxed their matchlist.
- **The Placement Call is documented in the RMS.**
 - Placement Calls will also be documented using the phone system as a source for cross-referencing; however the RMS documentation numbers will take precedence over the phone system numbers.
- **It has been at least two weeks since the last Placement Call effort was documented. A “Placement Call effort” can include a telephone conversation or a detailed voicemail.**

- Exceptions to this two week requirement may be made for the *FIRST* call for the following categories since these are unique and specific efforts:
 - VPS Placement Call efforts (calls made for vanpool drivers)
 - Lifecycle follow-up calls (new record activation and periods of inactivity)
 - Client Survey requests for contact or comments follow-up

(Appendix – Tracking Placement Calls – Barbara Laurensen Letter – January 14, 2010)

511 Bicycling Services and Web Site Maintenance

The CSD is responsible for providing 511 Bicycling services and Web site content maintenance.

Objective

The objective of offering 511 Bicycling services and conducting Web site content maintenance is to provide San Francisco Bay Area residents with a centralized resource for bicycling information, supplemented by knowledgeable, well-trained staff that can assist with specific bicycling information inquiries. Services include:

- Researching and providing answers to bicycling-related phone call and email inquiries.
- Assisting bicyclists with Bike Buddy searches in the RMS so they can ride together.
- Assisting bicyclists with bicycle trip planning using the 511 BikeMapper.
- Providing a centralized resource for bicycling related information such as route maps; bicycle parking and locker resource locations; how to take your bike on public transit and across Bay Area toll bridges; how to ride safely in traffic; tips on commuting; bicycling resources; bicycling related classes; and announcements of upcoming events and activities for bicyclists.

Scope, Tasks, Areas of Responsibility and Deliverables

- **Answering bicycling-related phone call and email inquiries.**
- **Performing Bike Buddy matching using the RMS and providing matchlists.**
- **Assisting with bicycle trip planning using the 511 BikeMapper.**
- **Maintaining and enhancing the 511 Bicycling Web site.**
 - Updating site content on an ongoing basis
 - Regular review of the Web site to confirm that the basic content and structure are accurate and up-to-date
 - Highlighting different program features
 - Informing users about regional and local programs, services, announcements and links
 - Regular updates to the **Announcement** section on the home page (<http://bicycling.511.org>)
 - Regular updates to the **Bicycle Classes Class Schedule** page (http://bicycling.511.org/class_list.htm)
 - Ensuring that the Web site is accurate, up-to-date and functioning properly
 - Regular review of the Web site pages to test that all links are accurate, up-to-date and functioning properly
- **Coordinating with MTC and bicycling organizations and local jurisdictions to ensure that 511 Rideshare has accurate and up-to-date information about bicycling resources.**
 - Transit bicycle access and transit station bicycle parking resources
 - Park and Ride Lot bicycle parking resources

- Bay Area bicycling maps
- **Providing feedback to MTC with recommendations for improving the bicycling Web site and associated tools in order to enhance the user experience.**

(Appendix – 511 Bicycling Home Page / Announcements Section)

(Appendix – Bicycle Classes – Class Schedule)

(Appendix – 511 BikeMapper – SF Beta Test Release - <http://mtcgis.mtc.ca.gov/btp/sf-beta-app/#>)

(Appendix – 511 BikeMapper – Bay Area - <http://bicycling.511.org/bikemapper.htm>)

Day 2 Parking Inventory Effort

The CSD is responsible for coordinating the Day 2 Parking Inventory Effort.

Objective

The objective of the Day 2 Parking Inventory Effort is to create an inventory of on-street and off-street parking resources that can be rapidly made available **after** an emergency or planned event (e.g., the MacArthur Maze collapse, Bay Bridge closures, extended transit service disruptions) adversely impacts the Bay Area's transportation infrastructure (e.g., roadways, bridges, transit options) by helping people return to work and other normal activities by utilizing public transit and/or ridesharing. This effort involves working collaboratively with Bay Area municipalities; delegated county partner agencies; private and public sector entities; transit agencies; and shuttle vendors in the San Francisco Bay Area.

As a result of the Day 2 Parking Inventory Effort we expect to provide the public with increased access to public transit and/or alternative parking/commuting options by providing the following:

- Relaxed on-street parking restrictions and enforcement by municipalities.
- Temporary off-street parking alternatives.
- Park & Ride Lots (existing and temporary) with convenient access to public transit.
- Park & Ride Lots (existing and temporary) for carpool and vanpool ridesharing purposes.

Scope, Tasks and Areas of Responsibility

- **Maintain the Day 2 Parking Inventory Effort Working Group contact list.**
- **Create, update, maintain and distribute Day 2 Parking Inventory Effort materials:**
 - **Day 2 Parking Inventory Effort Toolkit – Master File** (electronic copy)
 - **Day 2 Parking Inventory Effort Toolkit – Binder** (hardcopy)
 - Transit agency maps and schedules
 - Contingency on-street and off-street parking inventory
 - Guidelines on how to deploy, publish and recall parking inventory when necessary
- **Provide regular updates to the Day 2 Parking Inventory Effort Working Group.**
- **Research and review similar efforts by other agencies and implement best practices.**
- **Work with municipalities to suspend or relax on-street parking restrictions.**
- **Work with private and public sector entities to identify strategically located alternative and/or additional off-street parking inventory.**
 - Big Box Stores (e.g., Target, Walmart, Home Depot, Kohl's)
 - Park and Ride Lots
 - Malls and Shopping Centers
 - Caltrans
 - Port Authorities

- Congestion Management Agencies
- Other private/public entities with parking resources and/or an ability to assist the effort
- **Work with transit agencies in regards to off-street parking lots they control, as well as providing increased service or additional routes when necessary.**
 - BART
 - Caltrain
 - AC Transit
 - Other Transit Agencies
- **Work with shuttle vendors to provide expanded and/or additional shuttle services when necessary and authorized by MTC.**
 - Go Green
 - Other Shuttle Vendors
- **Incorporate a plan to create the necessary signage to be used when necessary.**
- **Create a plan for posting the necessary information on, as well as driving the public to, MTC's Emergency Web site in order to inform the public of their parking, transit and ridesharing options.**

Deliverables

- A list of on-street and off-street parking inventory that can be utilized if necessary.
- Materials that can be posted on MTC's Emergency Web site when parking inventory is utilized.
- An outline of the steps required to deploy, publish and recall parking inventory.
- An outline of the steps required to coordinate with transit agencies and/or shuttle vendors.
- Annual and/or "as needed" updates of **Day 2 On-Street Parking Inventory Outline.**
- Annual and/or "as needed" updates of **Day 2 Off-Street Parking Inventory Outline.**
- Annual and/or "as needed" updates of each **Day 2 Transit Agency Coordination Outline.**
- Annual and/or "as needed" updates of each **Day 2 Shuttle Vendor Coordination Outline.**
- Ongoing Day 2 Parking Inventory Effort material updates.
- Coordination of any Day 2 Parking Inventory Effort related meetings when necessary.

(Appendix – Day 2 Parking Inventory Effort Toolkit – Master File) – Pending

(Appendix – Day 2 Parking Inventory Effort Toolkit – Table of Contents) – Pending

(Appendix – Day 2 On-Street Parking Inventory Outline) – Pending

(Appendix – Day 2 Off-Street Parking Inventory Outline) – Pending

(Appendix – Day 2 Transit Agency Coordination Outline) – Pending

(Appendix – Day 2 Shuttle Vendor Coordination Outline) – Pending

Appendices

* (P) designates appendices that can be released to the public version

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511 Rideshare Activation Email – ADMIN Created
511 Rideshare Activation Email – SELF Created
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RRP Account Code Calls – FY 09-10
DID Response
Account Code Log by Agent Group
Account Code Log by Agent Group (Graphical)
Agent Group Tabular Summary (all calls)
Agent Group Tabular
Incoming Duration Summary
Agent Group Graphical Summary (all calls)
Activity Codes – Daily – Pending
Activity Codes – Weekly – Pending
Activity Codes – Month to Date – Pending
Status Summary – Pending
Status Detail – Pending
Additional Information for Review – Pending
New Record Review – Pending
Newly Added Employers – Locations (Data Entry Form Created)
New Employer Worksites for Review (Employer Module Created) – Pending
Potential Duplicates for Review – Pending
Lifecycle - NR Records (Day 5) – Pending
Lifecycle - Inactivity (WITHOUT email) (Day 30) – Pending
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511 BikeMapper – SF Beta Test Release (<http://mtcgis.mtc.ca.gov/btp/sf-beta-app/#>)

511 BikeMapper – Bay Area (<http://bicycling.511.org/bikemapper.htm>)

Day 2 Parking Inventory Effort Toolkit – Master File – Pending

Day 2 Parking Inventory Effort Toolkit – Table of Contents – Pending

Day 2 On-Street Parking Inventory Outline – Pending

Day 2 Off-Street Parking Inventory Outline – Pending

Day 2 Transit Agency Coordination Outline – Pending

Day 2 Shuttle Vendor Coordination Outline – Pending